

## Message Text

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ORIGIN COME-00

INFO OCT-01 AF-10 ARA-14 EA-12 EUR-12 NEA-10 ISO-00  
EB-08 MMO-04 SIG-03 ABF-01 SP-02 SS-15 PER-05  
/097 R

DRAFTED BY: COM/OIM:OPD:RMILLER MGR VP  
EB/OCA:CM/SPHARRIS  
COM/OIM/OPD:WAWALMSLEY  
COM/CAGNE/PHALE  
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AF/S/WEATON  
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COM/98./RGARNITZE  
G/MO/LAKIEFORTH  
ARA/ECP:WSKOK  
EUR/4PE:RLMANTIA  
EA/EP:DSTEBING

-----017756 251041Z /21/20

R 180932Z FEB 78  
FM SECSTATE WASHDC  
TO AMEMBASSY BRUSSELS  
AMEMBASSY THE HAGUE  
AMEMBASSY LAGOS  
AMEMBASSY MEXICO  
AMEMBASSY CARACAS  
AMCONSUL SAO PAULO  
AMEMBASSY BUENOS AIRES  
AMEMBASSY JAKARTA  
AMEMBASSY MANILA  
AMEMBASSY WELLINGTON  
AMCONSUL JOHANNESBURG  
INFO AMEMBASSY BRASILIA  
AMEMBASSY PRETORIA

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E.O. 11652: N/A

TAGS: BEXP, XB, XM, XT

SUBJECT: UNDER SECRETARIAL TASK FORCE ON U.S. FOOTWEAR  
INDUSTRY-MARKET RESEARCH REQUEST

REF.: A. STATE 263324 B. STATE 277571

1. MOST OF ADDRESSEE POSTS WERE ALERTED BY REFTEL A TO ESTABLISHMENT BY COMMERCE UNDER SECRETARY HARMAN OF SPECIAL TASK FORCE TO DEVELOP ACTIVE INTERNATIONAL MARKETING PROGRAM ON BEHALF OF THE U.S. FOOTWEAR INDUSTRY AS COUNTERPOINT TO EXTENSIVE FOREIGN PARTICIPATION IN THE U.S. MARKET. THIS ACTION TAKEN IN RESPONSE TO INSTRUCTION OF THE PRESIDENT TO ASSIST THIS INDUSTRY. REFTEL B SELECTED 13 POSTS TO SUBMIT MARKET RESEARCH DESK STUDIES ON BASIS OF REVIEW OF U.S. EXPORT DATA, TOTAL IMPORTS OF FOOTWEAR BY FOREIGN MARKETS, AND OPINIONS OF U.S. INDUSTRY EXPERTS. BY SIMILAR PROCESS, POSTS ADDRESSED THIS CABLE ARE BELIEVED TO REPRESENT MARKETS HAVING GOOD CURRENT OR FUTURE POTENTIAL, AND ARE REQUESTED TO SUBMIT DESK STUDIES USING SPECIFICATIONS CONTAINED THIS CABLE AS A GUIDE.

2. THE SPECIFICATIONS OUTLINED IN PARA. FOUR BELOW REPRESENT THE SCOPE OF THE INFORMATION WHICH INDUSTRY EXPERTS

DEEM NECESSARY TO DETERMINE THE INDIVIDUAL MARKET FOR SPECIFIC TYPES OF U.S. FOOTWEAR, AND TO PROVIDE CONVINCING EVIDENCE TO INDIVIDUAL AMERICAN MANUFACTURERS AS TO WHETHER A MARKET EXISTS FOR THEIR PRODUCTS.

3. IN LEVYING THIS REQUEST, WE RECOGNIZE THAT THE ABILITY  
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OF POSTS TO OBTAIN THE INFORMATION NEEDED WILL VARY ACCORDING TO THE SIZE OF THE DOMESTIC INDUSTRY, POST'S CONTACTS WITH KNOWLEDGEABLE LOCAL INDUSTRY SOURCES AND AVAILABILITY OF PERSONNEL TO UNDERTAKE THIS STUDY IN A TIMELY AND EFFECTIVE FASHION. FOR THESE REASONS, POSTS ARE REQUESTED TO PROVIDE THE FOLLOWING INFORMATION WITHIN THREE WORKING DAYS OF RECEIPT OF THIS MESSAGE:

A. CAN STUDY BE COMPLETED BY APRIL 7, 1978? IF NOT, WHAT IS ABSOLUTE MINIMUM TIME NEEDED?

B. IS IT NECESSARY FROM POST'S VIEWPOINT TO CONTRACT OUT ANY PORTION OF STUDY? IF SO, CITE OVERRIDING REASONS FOR CONTRACTING, INDICATE PORTIONS OF STUDY WHICH NEED TO BE CONTRACTED AND PROVIDE LIKELY COST RANGE OF CONTRACT.

C. WHAT, IF ANY, CHANGES WILL BE REQUIRED IN CCP OR CAP ACTIVITIES OR GOALS TO ACCOMMODATE STUDY.

4. IN REPLYING TO FOREGOING QUESTIONS, POSTS ARE ASKED TO REVIEW CAREFULLY THE FOLLOWING SPECIFICATIONS DRAFTED BY INDUSTRY REPRESENTATIVES. VIRTUALLY ALL POSTS SHOULD, IN

OUR VIEW, BE IN A POSITION TO OBTAIN MOST OR ALL OF THE INFORMATION REQUESTED IN PARAS A, B, C, AND G BELOW WITHOUT GREAT DIFFICULTY.

A. TOTAL APPARENT MARKET SHOW TOTAL LOCAL PRODUCTION, IMPORTS, AND EXPORTS BY PRODUCT GROUP, GIVING PRIOR TWO YEARS, CURRENT YEAR, AND TWO YEAR PROJECTION. GIVE BOTH DOLLAR VALUES AND UNITS (PAIRS). ALSO SHOW RETAIL PRICE RANGE OF SHOES BY PRODUCT GROUP. DISCUSS REASONS FOR PROJECTIONS.

B. DISTRIBUTION OF TOTAL IMPORTS SHOW IMPORT DISTRIBUTION BY PRODUCT GROUP AMONG LEADING THIRD COUNTRIES PLUS USA, GIVING PRIOR TWO YEARS, CURRENT YEAR, AND TWO YEAR UNCLASSIFIED

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PROJECTION. GIVE BOTH DOLLAR VALUE AND UNITS. SHOW RETAIL PRICE RANGE OF SHOES BY PRODUCT GROUP. DISCUSS REASONS FOR PROJECTIONS.

C. END-USERS ANALYSIS GIVING PRIOR TWO YEARS, CURRENT YEAR, AND TWO YEAR PROJECTION, INDICATE DISTRIBUTION OF

POPULATION BY AGE GROUP, DISTRIBUTION OF PER CAPITA DISPOSABLE INCOME BY AGE GROUP.

D. DISCUSS PREFERENCES FOR STYLE, QUALITY, AND FIT, AND IDENTIFY SIGNIFICANT MARKET SUB-SEGMENTS. DISCUSS SIGNIFICANCE/STATUS ASSIGNED TO AMERICAN CLOTHING STYLES, EMULATION OF AMERICAN LIFE STYLE. INDICATE FITTING CHARACTERISTICS OF FEET: SIZE RANGES, COMMON FOOT SHAPES.

E. MARKETING COMPETITORS ANALYSIS SET FORTH BY NAME INDIGENOUS AND THIRD COUNTRY MANUFACTURERS WHICH DOMINATE SALES OF FOOTWEAR, SHOWING APPROXIMATE MARKET SHARE. IDENTIFY PRODUCT LINES, SIGNIFICANT MARKETING STRENGTHS, AND RETAIL PRICE/F.O.B. PRICE STRUCTURES OF EACH COMPANY. INDICATE TOTAL NUMBER OF LOCAL MANUFACTURERS, AGGREGATE EMPLOYMENT AND PLANT INVESTMENT.

F. BUSINESS ENVIRONMENT DISCUSS THE FOLLOWING: 1. DISTRIBUTION SYSTEM CUSTOMARY FOR FOOTWEAR, BOTH DOMESTIC AND IMPORTED. SHOW NUMBER OF COMPANIES AT EACH LEVEL AND MARK-UP ADDED. IDENTIFY KEY RETAILERS AND DISTRIBUTORS. CREDIT TERMS GENERALLY IN USE.

G. TARIFF AND NON-TARIFF BARRIERS SET FORTH APPLICABLE DUTY RATES FOR EACH CATEGORY OF SHOES. LIST ALL NON-TARIFF BARRIERS. DISCUSS HOST GOVERNMENT'S GENERAL ATTITUDE UNCLASSIFIED

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TUDE TO SHOE IMPORTS, AND POTENTIAL FOR REDUCTION IN TRADE BARRIERS.

H. PROMOTION TECHNIQUES AND MEDIA MOST SUCCESSFULLY EMPLOYED.

5. APPLICABLE NON-RUBBER FOOTWEAR PRODUCT GROUPS ARE AS FOLLOWS:

A. MEN'S DRESS AND CASUAL. B. WOMEN'S DRESS AND CASUAL.  
C. CHILDREN. D. WESTERN BOOTS. E. MOCCASIN SLIP-ON.  
F. ATHLETIC. G. WORK SHOES/SAFETY (MEN'S ONLY).  
H. OUTDOOR BOOTS. I. WHITE DUTY SHOES. J. SECURITY  
FORCES DUTY SHOES (OXFORDS AND BOOTS).

6. ACTION REQUESTED: A) PLEASE REPLY TO QUESTIONS IN  
PARAGRAPH THREE ABOVE WITHIN THREE WORKING DAYS OF  
RECEIPT OF THIS MESSAGE. B) IMMEDIATELY COMMENCE STUDY  
IN ORDER TO MEET APRIL 7, 1978 DEADLINE IF POSSIBLE.  
YOUR COOPERATION IN ASSISTING THE U.S. FOOTWEAR INDUSTRY  
GREATLY APPRECIATED. VANCE

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## Message Attributes

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